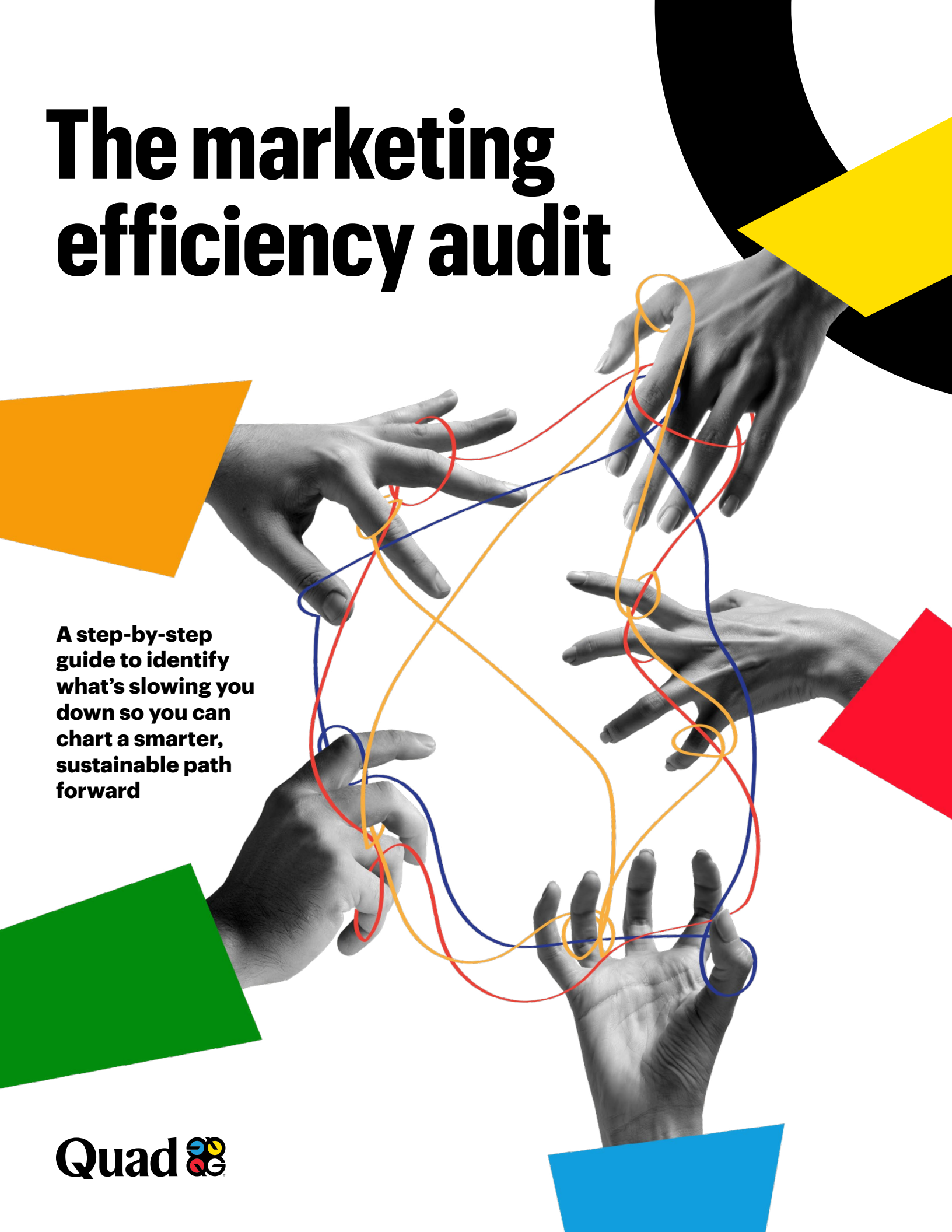


The marketing efficiency audit

A step-by-step guide to identify what's slowing you down so you can chart a smarter, sustainable path forward



EVERY MARKETER KNOWS THE FEELING: a packed road map, half the budget and a looming deadline. This is modern marketing — where chaos is standard and clarity is in short supply.

The usual advice? Get the right people. Upgrade your tools. Tighten up your processes.

All valid moves. But before you jump into solutions, have you paused long enough to diagnose the real problem? Are you asking the questions that reveal why things aren't working?

Without that step, even the most well-intentioned fixes fall flat. Silos persist. Strategy gets buried under execution. Tools gather dust. Everyone's moving fast, but no one's sure it's in the right direction.

Before you jump into another platform or define a new process, use this audit to take an honest look at what's slowing you down so you can find a sustainable path forward.



Step 1: Discovery and diagnosis



GOAL: Create an honest assessment of where marketing operations feel the hardest, and why and how it's impacting results.

Start by gathering real-world insight. Talk to the people doing the work. Observe their day-to-day. Map the handoffs, tools used and workflows. Look for patterns.

Here's what that might look like:

- **Conduct stakeholder interviews & workshops**

Hear from marketers, creatives, operations leads and executives. What's working? What's not? Where are they getting stuck?

For example: *Maybe your creative team is stuck in endless rounds of revisions because briefs are half-baked. Or operations is buried in last-minute requests that never made it onto the road map.*

- **Do a data deep-dive**

Analyze project timelines, workflow tools, tech usage and budget allocation. Numbers don't lie, but they don't explain themselves either. Look for inconsistencies and delays.

- **Shadow your team**

Follow a campaign from start to finish. Watch how long things take, where rework and bottlenecks happen and where confusion seeps in.

- **Challenge mapping**

Visualize your team breakdowns: siloed teams, outdated tools, unclear roles, delayed handoffs. Really visualize the system for what it is and not just what it's supposed to be.

For example: *Maybe marketing owns the strategy, but sales rewrites all the messaging before it hits the client. Or there's a tool that technically "connects" teams, but everyone is still managing their work in separate spreadsheets anyway.*

Watchouts:

- **Don't assume you already know the answers.**
- **Make sure you create space for everyone to weigh in.**
- **Avoid rushing ahead to a solution before fully defining the problem.**

Step 2: Align around a smarter system

GOAL: Translate those insights into a road map that works for your team and your goals.

This is where strategy meets realism. It's not about blowing things up and starting over. It's about creating a better version of what you already have (one that actually supports the way your team likes to work).

That could include:

- **Collaborative working sessions**
Get the right people in the room. Prioritize pain points. Define what success looks like and what it doesn't.

For example: Quad's Managed Services team has helped teams map out what "done" actually means. Because when creative, media and brand all define success differently, that's a recipe for confusion.

- **Future-state modeling**
Visualize the ideal version of your marketing engine. Faster handoffs. Smarter workflows. Tools that actually get used. Strategy that doesn't get lost in the shuffle.

- **Tech fit check**
Evaluate how your tools are really performing. What's driving value, what's overlapping and what's just collecting dust? Identify where upgrades, integrations or consolidation can streamline workflows.

For example: *Do you have a CRM that no one updates because the UX is difficult? How about reporting tools where the data is so dirty that nobody trusts the metrics?*



- **Team empowerment plan**
Outline what tasks can be offloaded, what skills need building and how roles might evolve in a more efficient setup.

Watchouts:

- **Make sure to have the right stakeholders aligned.**
- **Ensure Step 1 is fully baked before you move on.**
- **Don't zoom in on fragments. Look at the full system.**



GOAL: A clear, actionable road map that minimizes disruption.

Once you've got alignment, it's time to build confidence. That means a clear path, defined metrics and the right support to bring your new system to life.

Step 3: Activate the road map

What it takes:

- **Success metrics**
Set KPIs around speed, cost savings, quality and team satisfaction. Know how you'll measure progress and how you'll know it's working.
- **Change management**
Smart plans can fail without complete buy-in. Build a communication and training plan that brings everyone along for the ride.

For example: *Do great strategies flop because leadership didn't commit to reinforcing the new process? Or maybe because the people actually doing the work never got a say in how it would change?*

- **Flexible partnership model**
Whether you need a full operational overhaul, tech enablement or strategic consulting, find the right level of support.

Watchouts:

- **Leave a generous amount of time for change management.**
- **Ensure that steps 1 or 2 are thoroughly complete (and not rushed).**
- **Follow through: Execution is where most teams stumble. Don't underestimate this step.**

Why does this work?

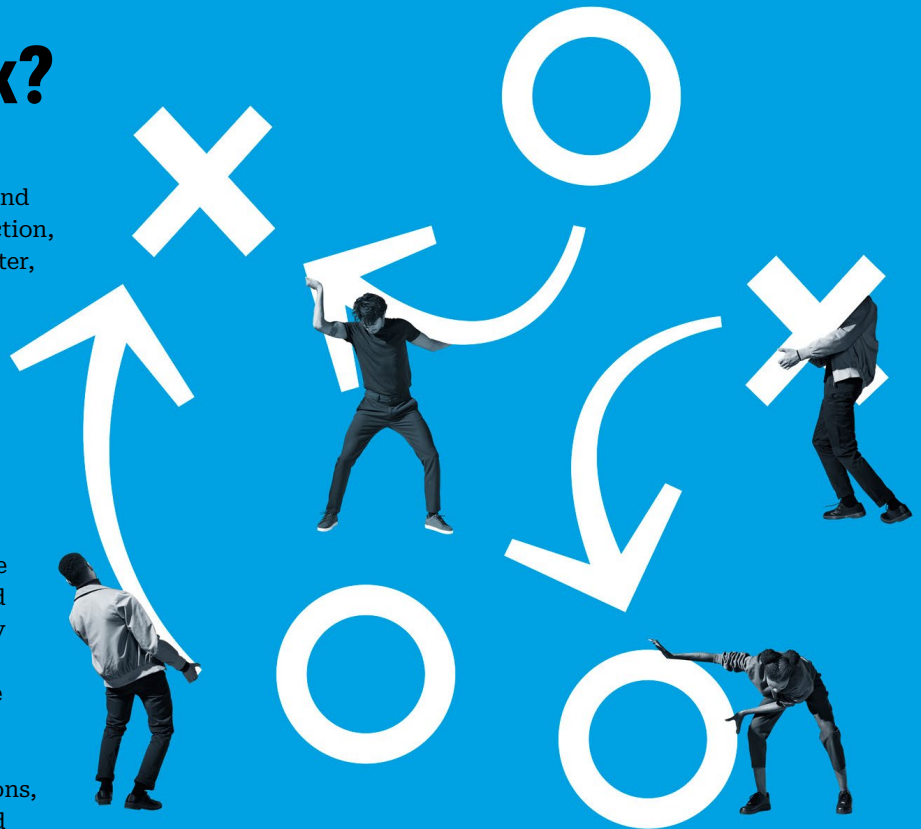
This audit treats marketing like what it is: a living, breathing system made up of people, tools, ideas and momentum. This framework helps you remove friction, unlock your full potential, and build a smarter, faster, more focused operation.

You don't need more hustle. You need a better system. One that works *for* you.

Even strong teams need reinforcements

Diagnosing your own marketing system is a bit like trying to read the label from inside the jar. It's hard to see the full picture when you're living in it every day. An outside partner can bring the objectivity, pattern recognition and cross-industry experience that's nearly impossible to replicate in-house.

A partner helps you ask the uncomfortable questions, push past surface-level fixes and identify the blind spots you didn't know you had.



Why Quad?

We see you: juggling multiple vendors, suppliers, agencies and consultants while trying to scale production and maintain brand consistency. What if you could do it all with a single partner, locking arms with your team to streamline day-to-day operations?

One partner. One big sigh of relief.

From full-service production to scalable client support, Quad's Managed Services ensures brand consistency, maximizes cost-savings and removes obstacles by taking on the operational heavy lift so brands can focus on strategic growth.

Ready to build a better marketing machine?

GET IN TOUCH

